CAPITAL CITY FINANCIAL PARTNERS

NEWSLETTER

SEPTEMBER 2024

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PICKLEBALL TOURNAMENT:

Join us for the next Client Event in our Capital City Community Connection Series!

This is a BYOP (Bring Your Own Paddle) event. Don’t have one? No problem—contact our office, and we’ll hook you up!

UPCOMING CLIENT WEBINAR

We are excited to invite all our clients to our virtual webinar, ***Understanding Your Medicare Options,*** on October 10th at 6:30 P.M. Hosted by Adam Smith, Partner and Financial Advisor, this session will provide valuable insights into the annual Medicare enrollment period, including important details about when and how to enroll in or switch Medicare plans. We look forward to seeing you there!

CLICK HERE TO SIGN UP!

UPCOMING:

Client Event
September 18th: Pickleball Tournament, *Lexington Leisure Center*, 11:30 a.m.

Educational Events
September 10th: Taxes in Retirement, *Columbia,* 6:30 p.m.

September 12th: Taxes in Retirement, *Columbia,* 6:30 p.m.

September 17th: Medicare Made Simple, *Greenville,* 11:30 a.m.

September 19th: Taxes in Retirement, *Columbia,* 1:30 p.m.

September 25th: Income and Social Security, *Columbia*, 1:30 p.m.

Webinars
September 9th: Taxes in Retirement, *Virtual*, 7:00 p.m.

September 24th: Taxes in Retirement, *Virtual*, 7:00 p.m.

Office Closure
September 2nd: Labor Day

COUNTDOWN TO TAX SEASON:

Make the most of your fall finances with these tax planning tips!

- Review Changes in Tax Law
- Maximize Retirement Contributions
- Plan for Itemized Deductions
- Review your Tax Withholding
- Consult with our Tax Professional, Alli, if you haven't already done so!

Alli Stephen, CPA
Director of Tax Solutions, Advisory Consultant

DON'T LET TAXES DERAIL YOUR RETIREMENT.

We value offering our clients resources, on our website, that can help navigate the complexities of taxes in retirement.

Our complimentary guides cover:
- The impact of different retirement accounts on your tax bill
- How the ever-changing tax laws can affect your income
- Strategies to help maximize tax deductions in retirement

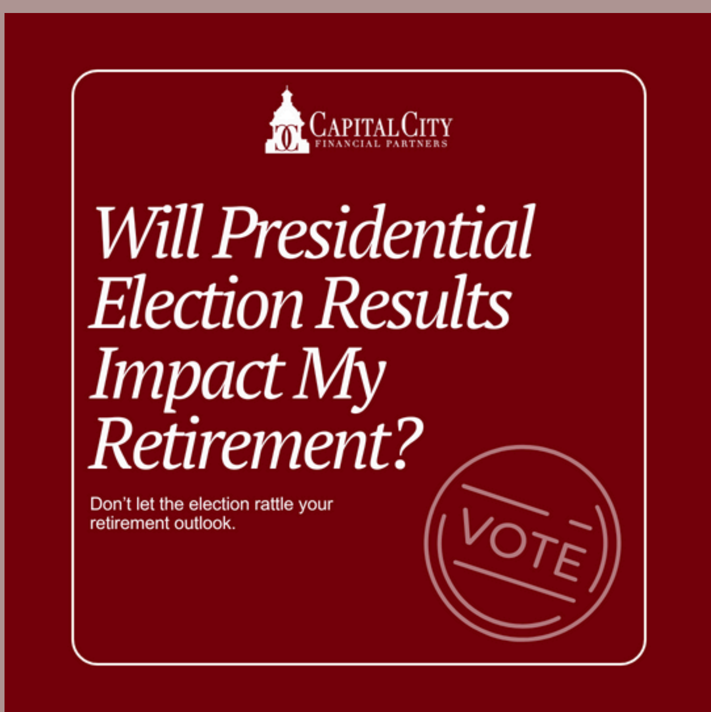
Embrace the Fall Equinox!

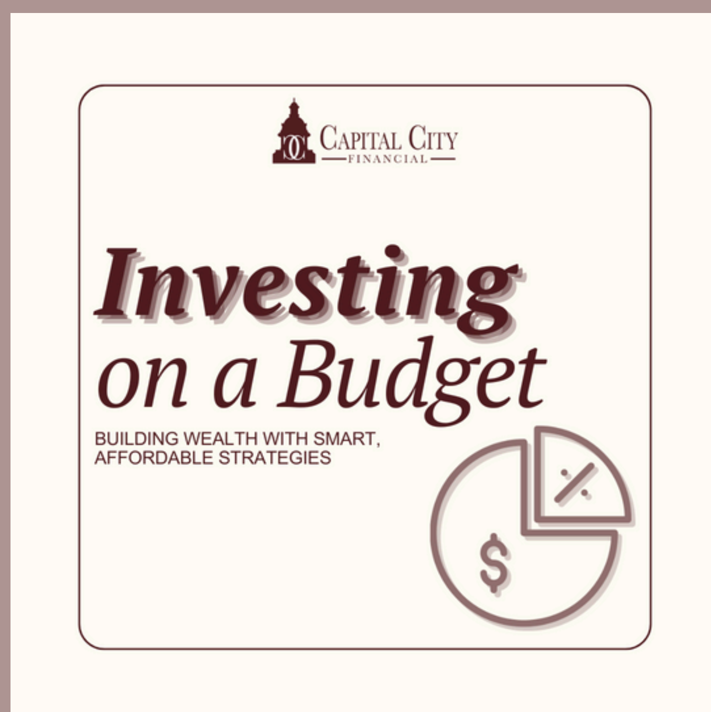
As we transition into autumn and the days grow shorter, it's a good time to revisit your financial goals. To help you stay on track, we've included this checklist to help you refresh.

Use it as a guide, and don't forget to schedule a meeting with your financial advisor to assess your accounts.

Let's make this fall a season of financial growth and success!

Upcoming posts on our *Inspired To Retire* Blog:

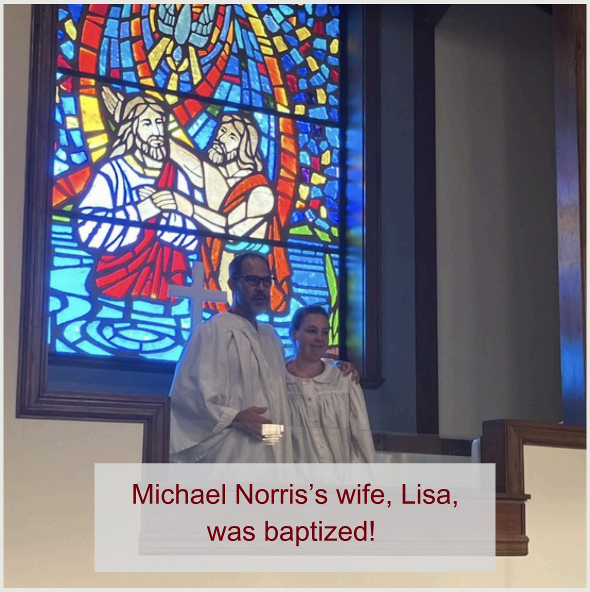




TEAM UPDATES

Michael Norris's son, John, took his first steps!

Sissy started her senior year at Clemson University!



Michael Norris's wife, Lisa, was baptized!

Our Columbia clients got to learn from the FBI at the Cybersecurity Elder Fraud Presentation.

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